LIBRARY OF CONGRESS
QUESTIONPOINT USER GUIDELINES

QuestionPoint User Group
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Forward

Advances in digital technology have revolutionized the way people go about their daily lives. They often bypass the library and turn first to the Internet for their information needs, even though the confusing array of information they find makes the need for a librarian more imperative. The Library of Congress wishes to meet the needs of all of its patrons, whether they step into our doors literally or virtually. In order to meet patrons at their point of need, the Library of Congress is partnering with OCLC to develop QuestionPoint, a software suite managing electronic reference and a reference network for the global exchange of queries. Utilizing QuestionPoint, the Library of Congress has launched the Ask A Librarian service with patron access to the service directly from the Library of Congress home page.

The result of the prominent placement of the Ask A Librarian service has been a ten-fold increase in the volume of electronic reference queries coming into the Library of Congress. Many of the standard practices enjoyed in what may be considered the more traditional reference model no longer apply in this new digital environment. Although reference staff must learn new skills and adapt to new technology, people still need our help and continue to turn to us as a trusted provider. In meeting their requests and when facing the growing volume of questions, we are reminded that nothing replaces sound judgment and the application of years of experience embodied in the personnel of the Library of Congress. All are enjoined to continue to apply the standard principles of librarianship and professionalism when issuing electronic correspondence under the heading of the Library of Congress.

These guidelines are intended to help librarians and managers through this transitional period. It is a living document that will evolve along with the service.

QuestionPoint Users Group

The Purpose of These Guidelines

The purpose of these guidelines is to ensure consistently high quality service performance from the Library of Congress (LC) reference staff in responding to inquiries through QuestionPoint (QP). These guidelines are intended to be flexible enough to accommodate growth in the system and our services, while still providing a general framework to maintain the high quality of service that LC already delivers in other formats of reference transactions. The Guidelines support the following established correspondence policy:

> The primary mission of the Library of Congress is to serve Members of the Congress and thereafter, the needs of the government, other libraries, and members of the public. The Library's staff will respond to reference and information requests in accordance with this mission.

> Correspondents are encouraged to use local and online resources. For those seeking further assistance from the Library of Congress, the staff will respond to their reference and information needs to the extent possible. Because the Library participates in a global network of librarians working electronically to answer questions, your online reference question may be submitted to this global network for reply.

> Please note that the scope of the services does not include: compilation of extensive bibliographies, requests for information connected with contests, completion of school or work assignments, translations or research in heraldry or family history.

This document is divided into Section I, Digital Reference Policies, Section II, QuestionPoint Implementation, and Section III, QuestionPoint Functionality and Best Practices.

Section I. Digital Reference Policies

1. Assure coverage of both chat services and question assignment. Integrate these processes into the standard operating procedures. (See §II:A1-2)
2. Use web-based Ask A Librarian pages (See §II:B)
   a. Create an intermediary page (See §II:B1a)
      i. Examine existing procedures and policies and integrate or create new service policy with goals for this reference service. Make them consistent with the goals of the institution and/or the reading room.
      ii. Consider how often a review of this policy will take place, and the procedures and responsible persons involved in a review.
      iii. Based on the Library of Congress mission statement, describe who can use the service. Define and target primary clientele. (Descriptions will be reading room specific. Reading room* staff and management may choose to link to their priorities of service or other documents that uphold local policies.)
      iv. Provide for compliance with copyright and all other applicable legal restrictions.
3. Ensure Quality Reference Services (See §III:A)
   a. General Standards for reference services must meet the same qualifications as those endorsed by the library profession in pre-digital days.
   b. Treat (answer, refer, route, delete) all questions. Act upon 100% of questions that are assigned.
   c. Reference work will meet all government employee ethics standards.
   d. Be committed to providing the most effective assistance.
   e. Offer accurate responses.
   f. Show courtesy and professional respect when answering questions.
   g. Uphold the principles of intellectual freedom.
   h. Maintain objectivity and do not interject value judgments about subject matter or the nature of the question into the transaction.
   i. For both electronic and print materials, comply with contractual licensing agreements, specific restrictions of use, and copyright laws governing the materials in question.
   j. Adhere to estimated turnaround time.
      i. Questions that come to the Library's Public Service Collections (PSC) divisions through the Ask A Librarian form must receive a response within 5 business days.
      ii. Questions that come to the Library from other institutions through the Global Reference Network must be responded to before the due date, which may be any interval between 8 hours and 30 days, depending upon the question. Always click on "Routing View" and look at the "Time Deadline" to be sure.
4. Comply with copyright laws and adhere to licensing agreements. (See §II:A6)
5. Regularly review the service. (See §II:A5)

* All references to reading rooms at the Library of Congress also relate to those offices or service units which answer questions for the public such as the Copyright office, the Digital Reference Team, etc.

Section II. QuestionPoint Implementation

A. QuestionPoint Administration

1. Staffing Digital Reference Services
(For Reference Managers and QP Institution Administrators)

Reference Managers, Supervisors and/or QP Institution Administrators determine which staff will be involved and their specific responsibilities and assignments. They select or assign participating staff upon basis of ability, interest and availability, computer skills, and interpersonal communication skills. They consider the number of staff required and skill levels needed in order to distribute questions, answer questions, edit the Knowledge Base, and support a chat service (should they choose to do so). Reference managers and/or QP Institution Administrators regularly compile and review statistics, review surveys and comments, and ensure that all QP users attend QP training sessions.

2. Integrating Digital Reference Services Into Regular Reference Procedures
(For Reference Managers and QP Institution Administrators)

In order to ensure that no reference questions will be lost, procedures should be standardized to accommodate staff members who must take leave. Staff for chat service during the hours that best meet information needs and expectations. Schedule for primary participants as well as relief and/or backup participants. Scheduling and load leveling are examined and evaluated on an on-going basis by managers, and adjusted whenever necessary and possible.

3. Duties of the QuestionPoint Institution Administrator
(For QP Institution Administrators)

The QuestionPoint Institution Administrator, specific to each reading room, handles the following tasks: monitoring concerns, problems, and questions; reporting major technical problems to OCLC at support@oclc.org or 1-800-848-5800; and providing system feedback to the Library of Congress Consortium Administrator. The QP Institution Administrator also creates generalized institution scripts to help librarians in his/her section provide consistent service; encourages the creation of individual librarian scripts; sets the administrative settings for the reading room account; completes the reading room QP profile; organizes participation in QP cooperative groups and/or coverage as needed; regularly reviews documentation and passes on helpful information to staff; and encourages reference staff to attend training and orientation sessions that may enhance digital reference skills (e.g. keyboarding, online communication, online searching, collaborative browsing, multi-tasking, or technical skills). Reading room administration may also want to designate a back-up person during the institution administrator's leave time.

4. Handling Inappropriate Patrons
(For QP Institution Administrators)

According to LCR 1812, inappropriate patron behavior is any act that detrimentally affects the "peace, tranquility and good order of the Library." Patrons committing any indecent act or solicitation should be reported to the person in charge of the area. The QP Institution Administrator may request that the individual desist from such activity or may delete the offending question without reply.

If there are frequent offenders, it is recommended that the QP Institution Administrator create an institution script to address the nature of what is and/or is not an appropriate inquiry. For example, "Your questions/statements are not appropriate for response by the Library of Congress. For information about the mission and priorities of the Library of Congress you may consult our Web site at: http://www.loc.gov/ndl/mission.html." Or "The Library of Congress answers questions about the collections and programs of the Library. The nature of this correspondence is not within the guidelines established for this service. Your message has been deleted and you will receive no further correspondence regarding this message."

Some inappropriate patron behavior may warrant the involvement of a supervisor and/or LC police. The QP system cannot block or delete patron e-mail addresses or patron accounts. However, your QP Institution Administrator can delete a patron's question from the system.

NOTE: Deletion is permanent. If this is a problem patron, it is advisable to print out the question to keep as a record.

5. Quality Assessment

Question review
(for Reference Managers)

Supervisors regularly review the work of their staff and the reports in the QP system. Unlike traditional in person reference, there is a record of the work of each librarian. The content of all reference answers coming from this institution reflect upon the Library of Congress and all answers are subject to review by supervisors.

User survey
(for QP Institution Administrators)

QP Institution Administrators use the patron surveys tool, found under "Administration/ Institution/ Surveys," to create and review surveys that QP patrons have opted to complete. The QP Institution Administrator sets up the forms to survey Ask A Librarian patrons, Chat patrons, or both. The QP Institution Administrator selects the survey questions and generates statistical reports of the survey responses. Survey reports should be distributed among staff and evaluated regularly to assess the effectiveness of digital reference services.

NOTE: The "Comments" field is a required field on the survey form; however, patrons do not have to complete it.

6. Database Licensing Agreements

Issue pending.

7. QuestionPoint News

The Members Resources section on the http://www.questionpoint.org site provides valuable help documentation and answers some frequently asked questions.

All QP users and reference staff are encouraged to subscribe to and participate in the QP discussion list (QuestionPoint-L). To subscribe to the list, send an e-mail message to

mckeowns@oclc.org with a subject of "QuestionPoint list request." Please include your name, e-mail address, title, and library with your request. For more information about QP-L, consult the QuestionPoint Web site.

LC employees should use a tone that is respectful to the list audience and should use their signature file on all postings. This list is not primarily for sharing technical information, unless you have an issue or problem that may be confusing to many QP subscribers. For technical problems, first check with your QP Institution Administrator or LC Consortium administrator before posting to QP-L, as your problem may be internal to this institution. If not, then report the problem directly to the OCLC's Customer Service Department (CSD), with ample detail about the problem (i.e. screen shots, error messages, question ID, global or local, and standard or enhanced chat) and equipment (i.e. institution ID, authorization, browser version, operating system, and platform). If a problem is discovered that affects all QP subscribers, a CSD employee will send a notification to the QP discussion list.

8. Promoting Digital Reference Services

All staff are invited to participate in training and to participate in the QP discussion list. Reading rooms may host their own training sessions for staff. Staff may choose to send promotional messages to listservs or discussion groups and refer to the Ask A Librarian service when giving presentations.

Library staff should also determine the extent to which the service should be incorporated into existing user instruction sessions and programs and the extent to which new instructional sessions or methods would be helpful.

B. Accessing LC Reference Services on the Web (For Reference Managers)

1. Ask A Librarian Pages

In digital reference, your interaction with patrons is conducted via Ask A Librarian pages. Your web forms are used to facilitate the "reference interview." Our web forms gather patron information to help librarians provide the desired information. The intermediary pages patrons in directing their queries to the right source. Bear in mind that each patron has to select from a list of LC reading rooms/divisions before submitting his/her questions. The appropriate division for the question may be unclear to the patron, and your intermediary page can help assist them in making these distinctions. Ask A Librarian pages for the various reading rooms should have a standard interface that is easily navigable. See the QuestionPoint Web site for both Ask A Librarian and chat patron submission form templates from OCLC.

a. Intermediary pages

The intermediary pages between the reading room Ask A Librarian list and the Ask A Librarian web form should contain the following information:
- Identification of the reading room, and a link to the reading room home page
- A link to the LC reference correspondence policy
- A paragraph defining the scope of the reading room's reference services, which may link to a larger document
- A brief description of the reading room's purpose
- A statement of how long users can expect to wait for a reply/response
- A statement of the parameters of the information provided by your service: What kind of questions the reading room will answer or will not answer (and in what order (prioritize patrons)). For example, factual questions/ ready reference, literature searches, questions about certain formats or subjects, certain education levels or geographic locations, family history questions, medical or law-related questions or other sensitive information, used car values, reverse telephone directory information, product evaluations, answers to contest or puzzle questions, questions from overseas users, or homework questions. A description of these services may require a link to a larger reading room specific document.
- A list related resources for frequently asked questions
- A link to other electronic resources within the Library's Web site: Home Page, Catalog, Databases, and Internet Resources
- A link to outside related resources (reviewed and updated regularly)
- A link to public library finder
- Any pertinent contact information: Surface mail, Phone, Fax, E-mail, Web Form, Chat service, General Inquiry Form

b. Ask A Librarian form

The Ask A Librarian web form should contain the following information:
- Allow users to contact the service via standardized web form
- Link to Error Report Form
- Include notification that the question may be archived with a promise that personal information will be removed. (Users indicate their acceptance in the yes-no drop down menu on the form)
- Include notification that the question may be forwarded to the Global Reference Network. (Users indicate their acceptance in the yes-no drop down menu on the form)

•Request that users be aware of their personal settings, e.g. parental controls, full mailboxes, e-mail filters, e-mail blocking, correct e-mail address, etc. in order to receive a response from a librarian.

•Privacy Statement about the removal of user information and removal of librarian information

Section III. QuestionPoint Functionality and Best Practices

A. QP System Orientation

1. General guidelines

The Library of Congress subscribes to both local and global components of the QuestionPoint service. In QuestionPoint, each reading room has been determined to be one institution, and all LC reading rooms together represent a single consortium. Each reading room has its own profile completed and submitted for review by the QP Institution Administrator. The LC consortium shares a single local Knowledge Base and access to the global Knowledge Base. All reading rooms have standard chat capability, should they choose to implement it, and a few have QuestionPoint Enhanced packages with advanced chat software.

a. Reading room profile
Every QuestionPoint institution must complete a profile to participate in the service, which should be done by your QP Institution Administrator. With the appropriate permissions, you may click on "Profile" in the right-hand corner of the black toolbar on the top of your screen to view or edit your reading room profile.

Your reading room profile determines your institution ranking in the routing algorithm when questions are routed from other institutions or partners. The data in the institution profile captures institution strengths and determines what type of questions the institution may be best equipped to answer. When an institution escalates a question to the Global Reference Network (GRN) via best match route, questions can be routed to the appropriate responding institution according to subject, format, language, geographic location, availability, and global question load.

b. Librarian accounts

When an institution profile is created, the Institution Administrator sets up an individual librarian account with permission rights for each librarian in the reading room or division. Upon creation, the librarian will receive a notification of the new account with the account login ID and password. Once logged in, most system use will take place in the Ask module, which is accessible from the black toolbar at the top of the QP system pages.

New and unassigned questions should be reviewed as they come into the institution's question queue. Depending upon the reading room, the Institution Administrator may assign questions or librarians may claim their questions. Librarians must notify QP Institution Administrators of any scheduling conflicts that will interfere with their ability to answer reference questions over a given period. Librarians may request specific question assignments from their QP Institution Administrators. Librarians must check for new and/or newly assigned questions on a regular basis.

Upon the receipt of a new question, read the entire inquiry history, patron information, and routing information (if any). Take note of the "needed by" date and time. The librarian may want to also note any easy or difficult questions and approach them accordingly. Questions then may be answered, referred to another reading room, routed to the Global Reference Network (GRN), or returned to the patron for clarification. For more information about what to expect from the QP system, see http://www.questionpoint.org/web/members/usingqp_faq.html.

It is appropriate to follow-up with patron queries by telephone, fax, or regular mail when necessary.

c. Patron Accounts

Every patron who submits a question or initiates a chat session will have an automatically generated web-based patron account containing his/her QP transactions that have been treated within the last 90 days. Patrons may view a question status (Answered, Unanswered, or Closed), reply to a question, or close a question from this account. Librarian responses are sent to the patron via e-mail and are logged in the question history viewable in their patron account.

If a patron inquires about a former transaction, the librarian may choose to: a) Direct the patron to a system-generated e-mail (e.g. confirmation of receipt, request for clarification or an answer) that concerns their original question, and instruct him/her to reply to that e-mail. His/her reply will be sent in an alert e-mail to the librarian that was assigned the question if the reply-to setting is turned on in the institution's administration module settings; b) Direct the patron to their web-based QP patron account to open the question, type their message into the text box and click on "Send a response" to continue the dialogue with a librarian; c) Or find the patron's original question in the system, verify its status, cut and paste the answer and send it via email. Do not reply to such an inquiry if the patron information does not match the name and e-mail address on the previously asked question/answer.

2. Technical Advisories

The QP system requires a computer workstation with an Internet connection (e.g. 56K or higher), an e-mail account, and a standard web browser (e.g. Microsoft® Internet Explorer 4.0 or higher or Netscape® 4.0 or higher). Microsoft® Internet Explorer (IE) is the recommended web browser. Any operating system that supports these aforementioned browsers should be able to run QuestionPoint with standard chat.

NOTE: QuestionPoint's enhanced communications package (QPE) requires additional software for both librarians and patrons. (See p.38 for more information about QPE.)

When you are logged into QP, your session will remain active for 30 minutes. If you do not click on a link within the system in 30 minutes, the system will give you two warnings and then automatically log you off. If you are adding records to the Knowledge Base (KB) or are working as a KB editor in the KB module, your session will remain active for 120 minutes.

Your cache settings may cause you to experience timeouts before your 30-minute session is over. If the user's browser is reading old or expired copies of the OCLC web pages from a cache, it could disable the browser from contacting the OCLC server during some transactions, and then the inactivity timer would not be reset. The following steps will fix the browser side of the problem.

Using Internet Explorer:
1. On the Tools menu in Internet Explorer, click Internet Options.
2. On the General tab, under the Temporary Internet Files heading, click Settings.
3. Click Every visit to the page.
4. Click on Delete Files and click OK.
5. Restart IE to make sure the changes take effect.

Using Netscape Navigator:
1. Open the Edit menu, choose Preferences.
2. Select the Cache panel (in the Advanced category).
3. Click Every time. (Document in cache is compared to document on network)
4. Click on Clear Memory Cache and OK.
5. Click on Clear Disk Cache and OK.
6. Restart Netscape to ensure changes properly take effect.

3. Viewing QuestionPoint Questions

Once you have logged on to QuestionPoint, you can view questions in the Ask module of QuestionPoint. Once in the Ask module, Questions tab, you can choose to view questions by specific type: Active, New, Referred, or Closed. Each type of question has its own question list that you can open by clicking on the name of the type you wish view.

a. Ask Module Questions Tab

The following table describes the question list and other tools in the Ask module, under the Questions tab.

Active	Questions with an 'active' status may be one or more of the following types: • Submitted by patrons through your Ask A Librarian chat or e-mail web forms • Manually added to the QP system through "Add Question" • A patron follow-up to a librarian's response (E-mail received) • Referred to you from a LC reading room or division (your consortium and your subscription group partners) • Referred to you from your cooperative referral group (if applicable) • Automatically forwarded to you from a partner in your cooperative coverage group (if applicable) • Routed to you through the Global Reference Network • Referred from you by e-mail to a partner or expert outside the QP system
New	This list contains questions and replies to requests for clarification that have not been acted upon yet. It contains a subset of the questions on the Active question list.
Referred	This list contains questions referred to you and questions referred by you through: • Refer to partner or group • Route through the Global Network • Referred by e-mail to a partner or expert outside of QP • Shared coverage with a cooperative group
Closed	Most often, this list contains questions that a staff member or a patron has closed because no further action is required. The list may also contain questions that have been manually added into the QP system with a 'closed' status through "Add Question."
Service History	This link will allow you to search for older QP questions. Questions older than 90 days (in any question list) are moved to the Service History question list each week. You will only be able to view the full question in the Service History if you are the owner, or originating institution, for the question. The 90-day period that determines migration to the Service History is based on the date that an action was last performed on a question. An action is any time something is added to the question's history, e.g. clarification, answer, referral, etc. NOTE: Simply viewing the question is not considered an action. The question history will be retained, however, all patron demographic information is stripped, except for their domain name. Patrons will no longer see questions in their patron accounts that are moved to the Service History. The QP Institution Administrator can submit Service History questions to the Knowledge Base or Delete them.

	NOTE 2: The QP Institution Administrator can only delete questions in the Service History that were originally submitted to your institution, not the questions that were routed from another institution, even if you answered it.
	
	Searching the Service History
	You can retrieve questions from the Service History by:
	    • Question ID #
	    • Librarian to whom the question was assigned
	    • Question status
	    • Referral type: Best Match to the global network, Referral to either the global network or a local group, or E-mail to an expert
	    • Date the question entered the QP system. You can retrieve by a single date or by a date range.
	Select all the criteria you want, and click on the Submit button. To list all questions in your Service History, just click on the Submit button without selecting criteria.
	
	After retrieving questions, a question list appears on the same page, below the search options. The entire question history is viewable by clicking on an individual question.

Add Question	This link will present a form for adding a question into the QP system. You may want to add a question to the QP system that has come to you as a result of a walk-up, fax, phone call, or any means other than through QP. You can add new questions and questions that you have already answered. Adding answered questions allows you to maintain a record of these questions and add them to a Knowledge Base.
	
	Complete the fields on the form:
	    • Select a question status. New means the question is open and does not yet have an answer. Pending means the question is in the process of being answered and may require clarification or referral. Answered means an answer has been provided and will be entered. Closed means the question has been answered and will appear only in the Closed question list.
	    • Enter question text.
	    • Enter any contact/patron information to ensure receipt of the answer (for unanswered questions).
	    • Enter answer text (if any).
	    • Enter any additional information about the question or the patron in the labels for the fields in the Label boxes and the corresponding information in the Value boxes. Otherwise, go to the next step.
	    • Click "Add" and the question will be added to the appropriate question list, as designated by the selected status. Or click "Reset" to empty all fields and start over.

b. Options from a question list view

Search by Question ID #
If you know the Question ID # you are looking for, enter it here and the question will open in full view.

View question list by assigned to
This drop down menu will give you a list of all librarians in your institution that have had questions assigned to them. Select and view any name to see the number of questions currently assigned

to that person. Select the name "Unassigned" to see questions that are not currently assigned. The assigned list will be different in each question list.

Update question list
(Depending upon the QP account privileges set by your QP Institution Administrator)
At the bottom of each page of the question lists, you have the option to update the question list in the following ways:
- Refresh
- Submit to Local KB (The LIBRARY OF CONGRESS)
- Submit to Global KB
- Submit to Local KB of any cooperative partner [if applicable]
- Close Question
- Close and submit to local KB (The LIBRARY OF CONGRESS)
- Close and submit to Global KB
- Delete [for QP Institution Administrators only]

Any of these actions can be made against a number of questions by selecting the check box next to each question, then choosing the appropriate action from this drop down menu, and then clicking on "Update List." This is the best way to add questions to the KB en masse.

NOTE 1: The options in the Update List menu will vary slightly in the Closed question list.

NOTE 2: "Refresh" will renew the entire question list and retrieve any new questions or question statuses that have occurred since you last loaded the page.

c. Opening QuestionPoint Questions

A question must first be opened before it can receive a response. To open a question in any list of questions in the Ask module, place your mouse arrow over the text of the question you want to open; the text will become an underlined hyperlink and left mouse click on it. Once you have opened a question, the Full Question page displays: the question text, additional information about the question and the patron who submitted the question, and a history of the question's life in the system.

B. Establishing Quality Reference Services

1. General Standards

It is likely that you will receive both general and highly specialized questions, and it may be appropriate to answer a general reference question, especially when the information is readily available and does not require in-depth research. Reference librarians are expected to answer all parts of the question and practice good search strategies, as defined by the profession. For questions requiring more in-depth answers, assistance may be provided when appropriate. Search time should be limited to the amount of time that your reference section head recommends. Reference librarians must refrain from judging the question or the patron in the answer, and refrain from editorializing the answer. Librarians are expected to adhere to the QuestionPoint Guidelines for all QP subscribers (see http://questionpoint.org/web/members/memberguidelines.html).

2. Quality Answers

a. Bibliographic instruction

Include bibliographic instruction, as appropriate. When information from a source is not immediately useful, the librarian should add value to that information either through analysis, description, keywords, pathways, or rewording. Encourage user awareness of the potential information resources that may fulfill individual information needs. All responses should be written clearly and relate to the level of the inquiry.

b. Appropriate resources

The librarian should do his or her best to locate and recommend at least one resource for every question. (See "The Librarian's Index to the Internet" at http://www.lii.org or "The Librarian's Internet Survival Guide Strategies for the High-Tech Reference Desk" by Irene McDermott for recommended general resources.) In addition, the librarian may attach materials, refer the patron to his or her local library, refer the question to another reading room or route it to the Global Reference Network for follow-up. If a patron is referred to the Library of Congress for walk-in service, please guide him/her to the "Information for Researchers" (see http://www.loc.gov/rr/main/inforeas/) and the "Reader Registration" (see http://www.loc.gov/rr/security/readerreg.html) pages so that he/she is aware of LC policies.

c. Accuracy

Proofread your answer and check your spelling. For further information on LC correspondence policy, see the Library of Congress Correspondence Manual found on the ISS Web site at http://lcweb.loc.gov/staff/iss/pdf/lccorr.pdf.

Validate the URLs that you have cited, by making sure that they link to something, and link to the page intended. You may use the HTML Validation tool on the LC Web Tools page at http://www.loc.gov/staff/webdev/. Write the complete URL (include http:// when applicable). Be sure to enclose URLs and e-mail addresses in angle brackets, with a space on each end of the URL or address. Only URLs that do NOT end in a file type (e.g. .html, .jpg, .pdf, etc.) should include the back slash at the end. If a backslash is added to a URL that ends with a file type, the URL becomes invalid. In addition, when writing an e-mail address, use "mail to:". There is no space between "mail" and "to". E.g. < http://www.google.com > or < mailto:mcad@loc.gov >.

Further explanation about the difference between the way URLs are typed and displayed within the system and in system e-mail messages to patrons:

	The typed URL	In the QP system (both librarian and patron accounts)	In the corresponding system e-mail messages to the patron
NO	<www.loc.gov>	Totally invisible	May not appear as a hyperlink (click-able directly to the Web site)
NO	< www.loc.gov >	Visible with carats, but not as a hyperlink	May not appear as a hyperlink
NO	http://www.loc.gov	Visible as text, but not as a hyperlink	May appear as a hyperlink
YES	< http://www.loc.gov >	Visible as a hyperlink without carats	May appear as a hyperlink

3. Citing Resources

When citing materials, cut and paste the full record view from the OPAC, or use JLGMARC2, (a tool specific to LC). When using databases, look for an option to select extended records to print or save, then cut and paste them into the answer text. Complete bibliographic citations add value to a usable question and answer (Q&A) set that may aid other librarians searching by topic in the Knowledge Base (KB), and/or enable some forms of fulfillment such as document delivery, ILL, or open URL functionality. Librarians should only cut and paste from the brief record view or e-mail records separately when the Q&A set has content that is not suitable for addition to the KB.   (For more information about what records are suitable for the KB, see p.31-32.)

NOTE: Attachments are delivered directly to the patron and are not retained in the QP system due to server space, so if you have attached your bibliographic citations or other pertinent information, the Q&A set may not be suitable for the Knowledge Base.

If the citation is e-mailed separately, it won't be included in the final Q&A set that will be archived. The brief citation does not capture some important information, such as the ISBN. The minimum required fields for a book citation are: personal name (author), main title, published/created, and ISBN. Depending upon the nature of the reference question, librarians may use their discretion to remove any other fields deemed unnecessary (e.g. the holdings information, type of material, variant titles, edition, description, or notes). NOTE: If you will be referring a patron to ILL or Photoduplication, it is often useful to include the LC Control Number and Call Number. When applicable, the bibliographic citation style for the Library of Congress is the Chicago Manual of Style. See http://lcweb2.loc.gov/ammem/ndlpedit/handbook/notesbib.html. To use an online tool to create a citation, you may use IMSA's wizard at http://www.wizard.imsa.edu/cite/index_html/.

a. How to cut and paste multiple records from the LC OPAC

In Voyager:
1.   Highlight/Click on each record from the results list that you want to recommend in your answer.
2.   Go to the "Edit" menu at the top of the screen and choose "Mark" then "Selected". The highlighted items will now have an arrow, =>, to the left of the entry.
3.   Then click on "Save" to save these records as a text file.
4.   Open the text file in a word processor or Notepad This list will include the full record and holdings information for each item chosen. The dashed lines separate records. Remove any extra lines or fields you don't want to include in your answer.
5.   Then cut and paste your bibliography, complete with tagged fields, into your QP answer text box.

In the OPAC on the web:
1. Click in the checkbox next to the items from results list that you want to recommend in your answer.
2. Scroll to the "Save, Print and E-mail" box either at the bottom of a Title List or the bottom single Record display page.
3. Choose one of the "Select Records" options.
4. Click on "Print or Save …" button. A plain text list of the items you chose will appear in your browser window. This list will include the full record and holdings information for each item chosen. This list can be copied or saved as plain text and brought up in a text editor. The dashed lines separate records.
5. Copy the text into a word processor or Notepad and remove any extra lines or fields you don't want to include in your answer.
6. Then cut and paste your bibliography, complete with tagged fields, into your QP answer text box.

b. How to cut and paste multiple records from the JLGMARC2 Bibliographic tool

JLGMARC2 comes pre-loaded with Library of Congress machines and can be found in Voyager 2000 folder under ILS Add-Ons. JLGMARC2 is a bibliographic tool to be used with the Endeavor system and can be used to create quick bibliographies in a variety of citation and card formats, as well as html. It also has a special format matching the citation format for the QuestionPoint Knowledge Base (CDRS), and is ILL compliant. The CDRS format in JLGMARC2 is recommended if you are sending out citations for 20 or more records, if you think that the patron may want to or have to retrieve items through Interlibrary Loan, or if you want citations saved in the Knowledge Base.

Records saved or exported from the LC ILS (Endeavor Information Systems' Voyager), as well as MARC 21 records obtained from other sources, can be processed by JLGMARC2. It does not interact directly with Voyager, and it does not require the presence of Voyager or any other application software except WordPerfect. The WordPerfect add-in JLGMARC2 is a program which will format and print MARC 21 records. The program imports the bibliographic records into WordPerfect so as to allow users to edit the data in word processing mode prior to display.

In Voyager:
1. If you are using Voyager, you must first mark and save the records of interest.
2. Close all active WordPerfect documents/sessions. Go to your Desktop; open the "Voyager 2000" icon, then the "ILS Add-on" subfolder.
3. Double click or open the JLGMARC2 icon.
4. Follow the JLGMARC2 dialog to specify the source file and desired format. "Standard" is the LC printed card format in page form, "Brief" is just the descriptive entry, "MARC tagged" is the diagnostic form showing full MARC content designation, and so forth.
5. If you saved the records from Voyager, the source file is the name you chose when you saved the records. You will also have the opportunity to specify captions to be included in the header in the resulting WP document, and to specify the number of records to skip, if any, and the limit on the number of records to process, if any. You will also be asked to specify which character set is utilized in the file, depending on the source of the MARC 21 records.

    If you are preparing HTML output, you must indicate whether the character set should be limited to the characters in the basic Pan-European fonts, or whether to assume that the resulting web pages will be viewed using full Unicode fonts.

6. When you have set all your desired options, select the [OK] button.

7. JLGMARC2 will show a progress gauge as it does its work, and then at completion it will indicate the number of records processed. If you specified a target file in the options

dialog, JLGMARC2 stores the resulting WordPerfect document under that name. In any case, JLGMARC2 is then finished and leaves you in the WP document that you can then work with or print as with any other document. In HTML mode, a text document will have been saved to the location you specified, which can then be fed into one of the standard HTML editors such as HomeSite or DreamWeaver for final preparation of web pages.

In the OPAC on the web:
1. Select items from results list that you want to recommend in your answer
2. Scroll to the "Save, Print and E-mail" box either at the bottom of a Title List, or the bottom single Record display page
3. Select the radio button marked "MARC Format"
4. Click on [Print or Save Search Results] button
5. Select your browser's File/Save As option, select a directory/folder location on your PC, and enter a file name of your choice (type over any file name that your browser puts in the File Name box first).

Internet Explorer users: in the "Save as type:" box, be <u>sure</u> to select "Text file (*.txt)" before saving, otherwise the file will not be saved properly.

6. Select the [Save] button. NOTE: You cannot append records to an existing file. If you subsequently want to save additional records, you must enter a different file name (if you use an existing file name, you will be prompted whether or not to overwrite the existing file).

4. Answer Structure

A well-structured response has a salutation, body and closing statement.

a. Salutation

The QP system automatically inserts a patron salutation, a generic notice of thanks for using the service, and the patron query around your answer. This inserted data is viewable in the patron e-mail, but not in the QP system question history or patron account. You do not have to add "Dear Patron" or any expression of gratitude for using the service, as it is inserted for you when you click on "Submit" to send your answer to the patron.

b. Body

Type the content of the answer to the inquiry into the answer text box. For example:

The name of the comic strip is indeed "Tiny Tim." Created by Stanley Link, it was published each Sunday by the Chicago Tribune-New York News syndicate from July 23, 1931 to March 2, 1958. Dotty was actually Tim's sister; they were two inches tall, and their modes of transportation were a model airplane and a toy aircraft carrier. We have verified this information from the from the following two sources:

Main Title: The Encyclopedia of American comics / edited by Ron Goulart.
Published/Created: New York : Facts on File, c1990.
Related Names: Goulart, Ron, 1933-
Related Titles: American comics.
Description: viii, 408 p., [16] p. of plates : ill. (some col.) ; 29 cm.
ISBN: 0816018529 (alk. paper) : 0816025827 (pbk.)
Notes: "A Promised Land Production."
          Includes bibliographical references and index.
Subjects: Comic books, strips, etc.--United States--Dictionaries.
          Cartoon characters--United States--Dictionaries.
          Cartoonists--United States--Biography.

Main Title: 100 years of American newspaper comics : an illustrated encyclopedia / edited by Maurice Horn.
Published/Created: New York : Gramercy Books, c1996.

Related Names: Horn, Maurice.
Description: 413 p. : ill. (some col.) ; 31 cm.
ISBN: 0517124475 (HC)
Notes: Includes bibliographical references (p. 405-406) and index.
Subjects: Comic books, strips, etc.--United States--History and criticism.

We were able to find only a single example of the comic strip online. The San Francisco Academy of Comic Art Collection" site has provides an example at the following page:

< http://dlib.lib.ohio-state.edu/cga/images/501-600/0512R.gif >

Bibliographic information on other print resources which discuss "Tiny Tim" and which contain other examples of strips, is available from Michigan State University Libraries Special Collections Division at:

< http://www.lib.msu.edu/comics/rri/trri/tiny.htm >

You can search for all of the sources mentioned above using your local library catalog. If you cannot find them, your local reference librarian will be able to help you interlibrary loan them from a nearby library. Should you want additional examples of the comic strip, you may wish to consult back issues of a newspaper that published the strip, such as New York's "Daily News." Again, your local librarian will be able to help you locate the appropriate issues.

Cite and describe materials that are attached to the answer (if any), and instruct the patron on how to access the attachment. As attachments are not retained in the QP system, the complete citation will help to recreate the full response if necessary.

If you choose to compose your message in Word or WordPerfect before pasting it into the QP system (recommended), quotation marks and apostrophes may display to the patron as numeric codes. In order to rectify this discrepancy, turn off the Smart Quote feature in the word processing software that you use (e.g. Word or WordPerfect) so that it uses regular quotation marks.

c. Closing statement

Provide a closing statement to the patron. This statement can consist of a single sentence, multiple sentences, a single word or phrase, or any combination thereof.   It may be valuable to create and save scripted text that describes your or your reading room's customary closure. Examples: "We hope the information we've provided will assist you with your research"; "I hope you find this information helpful"; "We hope this answers your question. If you have further questions, please contact us again and we will be glad to provide additional assistance"; "I hope this answer proves helpful. Please contact us again if you have additional questions"; "Sincerely"; "Best wishes"; "Have a good day."

The librarian signature should be a part of every closure, and saved in a librarian script. The librarian signature may contain a librarian name or initials, title, institution, and any contact information, as is prescribed by your reading room administrator. You may also want to add a URL. For example:

> Michelle Cadoree
> Science, Technology & Business Division
> Library of Congress
> Washington, DC 20540-4750

Or
> The Digital Reference Team
> Library of Congress
> Pca
> < http://www.loc.gov/rr/askalib/ask-memory.html >

C. Acting Upon QuestionPoint Questions

1. Local LC Questions

Local LC questions may come to your reading room directly from your public Ask A Librarian web form, routed from another reading room or division at LC, referred to you from a cooperative partner (if your reading room is participating in QP cooperative groups), automatically forwarded from the web form of a member in your cooperative group with whom you are sharing web form coverage (if your reading room is participating in QP cooperative groups with coverage), or as completed chat transcripts. These questions do not have an explicitly stated time deadline attached to the question metadata, as globally routed questions do. You will be notified of any new questions or follow-up replies to answered questions via e-mail at the address designated by your QP Institution Administrator in your institution settings.

The full question view will give you the following options for handling a local question: answer, request clarification, refer by e-mail, refer to partner (my subscription group), refer to partner (all cooperative groups), or best match route. Other functions available on this screen include: add script, assign question, make a librarian note, save draft, close question, add to the Knowledge Base, and add an attachment. Institution Administrators may delete questions.

a. Answer

Respond to the question. If the question pertains to your resources or services (see the question routing information), answer it completely. Remember to click on "Draft" and "Submit" at least every 10 minutes to prevent losing your work. As an alternative, it is recommended that the answer is composed and saved regularly using a separate application such as Notepad, which does not have any formatting idiosyncrasies. A single response can be up to 32K (about 6 pages of single-spaced text).

If a patron has responded "No" to the question about forwarding and archiving the Q&A set that is asked on the Ask A Librarian form, answer the question and do not send the question outside of the Library of Congress or add it to any Knowledge Base. You will find the patron's response in the third field of the full question view: "Forward to CDRS? (Yes/No)."

Special circumstances:
If the question appears to be a homework question, give instructions on how to find the answer rather than doing the research, or look up a local library for the patron and tell him/her what to ask for. LC staff will not complete homework assignments.

If more in-depth research is necessary, give as much information as is reasonable and advise the patron to visit their local library. This may not be advisable for patrons in foreign countries. Look up a library for him/her if possible.

If the question is not suitable for the Library to answer, e.g. regarding personal data, legal guidance or health aid, direct the patron to consult a lawyer, doctor, or other appropriate resource. Do not refer these questions inside LC or route them to the Global Reference Network.

If a chat transcript has been referred to you, help orient the patron by identifying yourself and the nature of the referral in your answer.

If an answer or attachment bounces back to your reading room as an undeliverable message, try to find the correct patron e-mail address using e-mail finder tools and re-send it. If this proves unsuccessful, you should attempt to contact the patron at least once via an alternative communication port, either by phone, fax or surface mail.

b. Request Clarification

If there is more than one way to respond to a question, or there is not enough information to answer, refer, or route the question, the librarian may request clarification from the patron. Select the "Clarification" radio-button and type a specific question into the answer text box, as well as instructions on how to respond to the e-mail that they receive. The librarian may also add a few information resources that could be helpful to the patron. Then click on "Submit."

The librarian may close the question after requesting clarification. The question will also have a 'closed' status in the patron's QP account, which can be confusing to the patron. The reading room should use an institution script when asking for clarification to help the patron to find the question in their Closed question list in the patron account. For example, "We are closing your question at this time. If you respond to our request for clarification, your question will return to 'active' status. You may respond either by replying to this e-mail message or by responding from your QuestionPoint patron account."

Depending upon your institution settings, patrons can reply to the e-mail request for clarification without having to log into their patron account and their reply will go back into the QP system. When the patron responds to a request for clarification, the inquiry will return to 'active' status, and an alert message will be sent to the librarian assigned to that question. It is recommended that your QP Institution Administrator turn on this function in the Administration module settings so that all patron replies will be automatically added to the question history.

NOTE: No alert message is sent if the question is currently unassigned. Text is appended to the request.

If the patron reply-to function has been enabled, the question history in a Full Question record may contain unnecessary text, such as a copy of the message from QuestionPoint. Editing the patron reply is desirable, as dialogue may get rather lengthy. Remove unnecessary text from the reply so it does not appear in the question history. If necessary, add text to the reply. When you open a question that has a patron response, the QP system provides three options for processing a patron's e-mail reply: Save, Edit, or Delete.

NOTE: Only after selecting "Save," "Edit," or "Delete" can the librarian take action on the question, e.g. Answer, Refer, or Route.

c. Refer by e-mail

You may want to refer a question by e-mail to someone outside the QP network. For example, a reference question originating from a Congressional office should be referred to the Congressional Research Service (i.e. weboperations@crs.loc.gov). For a description of Library of Congress service areas and how to contact them see the link to "Descriptions of Services Associated with the LC E-mail Group Accounts" page on the "Staff Electronic Resources" page at http://www.loc.gov/staff/rr/refresources/descriptions.html.

In order to refer a question by e-mail to someone outside of the QuestionPoint network, first open the question. Then, from the full question view, select "Refer by E-mail" in the drop-down menu next to the Refer Question button, and then click on the button.   On the next screen, type the desired destination e-mail address in the text entry box to the right of the right arrow, or click on the down arrow in the drop-down box to select the name of a contact person that you have added to your personal address book (in "My addresses" under the Settings tab in the Ask module). The text of the e-mail message that your recipient will receive is in the gray box below their e-mail address.

Normally, a QP institution keeps a question in the Active question list when a question is referred by e-mail. The partner receives the question by e-mail, answers it, and replies to the message (by clicking the Reply button). The question and answer are sent back into the QP system. The QP institution that originally referred the question is then responsible for sending the partner's answer to the patron and closing the question.

If you do not want to handle the delivery of the answer or wait to close the question, ask your contact partner to respond directly to the patron with an answer and then close it. (You may want to establish an institution script for this purpose. **You will have to add the patron's name and e-mail to your message**. (See NOTE 1 below.) This will reduce the number of pending questions and simplify the correspondence process. The disadvantage is that there is no answer to add to the Knowledge Base.

When referring a question by e-mail, inform the patron that their question is being referred and that they can expect a direct response from the person or institution that was sent the question. Give them an e-mail address or Web site.

NOTE 1: Only the question history is attached to the e-mail that goes out to your expert/partner. Should the patron name, e-mail, reason for research, or any routing information be pertinent to the question, this data must be copied into the message to the expert/partner.

NOTE 2: When using the "refer by e-mail" function, all librarian notes and messages are made public in the text of the e-mail unless edited by the librarian from the full question view of QP system before sending to the patron.

d. Refer to Partner (My Subscription Group)

Your subscription group consists of most reading rooms or divisions here at LC. Reading rooms are partnered with other reading rooms and service centers in the Library of Congress. When you Refer to Partner (My Subscription Group Only), you are making a referral within LC.

A librarian/administrator may refer a question to a partner at LC if:
- An answer from another reading room would be more appropriate
- An additional response is needed from another area
- The question seeks an answer outside the scope of the resources and services of the reading room
- The reading room lacks the materials in the necessary format required to adequately respond
- The reading room believes there is no answer or cannot find an answer, and another reading room may be able to verify the belief that there is no answer or can provide an answer
- The reading room is overloaded with questions and cannot find the time to respond to the question

If the question must be referred, do so in a timely manner in order to allow for sufficient time to respond after reassignment.

When appropriate, the librarian should respond to the patron with information about where the question is being referred, and any pertinent contact information, <u>before</u> referring the question, in order to show that action has been taken on the question. In addition, if the librarian is able to partially answer the question, this information should be included in this response to the patron <u>before</u> referring the question. (The reading room may want to establish an institution script if they often use the same referrals.) You may send your note to the patron as a clarification, or as an answer.

When referring a question, give the reason for this referral in the empty text box provided for this purpose (after clicking on the "Refer Question" button, on the next page entitled "Refer Question to Partner" under the selected partner field). Here, the librarian notes resources that have been consulted, if any. (The reading room may establish an institution script for this purpose.)

To refer a question to another reading room, open the question, select "Refer to Partner (My Subscription Group Only)" in the drop down menu, and then click on the button "Refer Question."

A librarian may search for a corresponding reading room to limit the referral according to subject strengths, or simply choose a referral partner. If uncertain about where the question should go, phone the most appropriate reading room and inquire before referring the question. For a description of reading room services and collections see the link to "Descriptions of Services Associated with the LC E-mail Group Accounts" on the "Digital Reference Project Resources" page off of the LC staff page at http://www.loc.gov/staff/rr/refresources/descriptions.html.

After the question has been referred, the librarian will find the question in the Referred question list, and may view its status if they are the originating or currently assigned reading room

Do NOT perform any action on a question after referring it, as the action will be reflected in the partner's question list, as well as in the patron account. If you act on a question after it is referred from your reading room to another (either by Answering the question or Closing the question) it re-assigns the question to you but appears in the list of the other reading room. After referring a question, you must recall it before acting upon it.

e. Refer to Partner (All Cooperative Groups)

Your QP Institution Administrator may form or join existing groups to enhance collaboration possibilities. Your institution may join or create up-to-5 cooperative groups online. Should your institution be a member of a virtual cooperative group, you will have the option to "Refer to Partner (All Cooperative Groups)" under the "Refer Question" option. The referral process is very similar to Refer to Partner (My Subscription Group). You can limit by subject strength or select the appropriate cooperative partner. If you've joined a public subscription group, your institution may share (i.e. search and submit to) the local Knowledge Base of the subscription group. See http://www.questionpoint.org/web/members/documentation/gs/gs_overview.html#qpgroups/ for more information.

f. Route to global (Escalate to the Global Reference Network (GRN))

When to route a question
A librarian may escalate a question to the GRN if:
- The patron has consented to sending the question beyond LC on the Ask A Librarian submission form
- The information need is clearly stated
- The information need can be met more effectively and efficiently outside the Library of Congress
- The question seeks an answer outside the scope of the resources and services of the Library of Congress
- The appropriate staff member who could answer the question is on leave
- The librarian finds conflicting answers and would like input from another library
- The librarian believes there is no answer or cannot find an answer, and another library may be able to verify the belief that there is no answer or can provide an answer
- The reading room is overloaded with questions and staff cannot find the time to respond to the question

If the question must be escalated to the GRN, do so in a timely manner in order to allow for the maximum turnaround time after reassignment.

Before routing a question
1.) Verify that the patron has given permission to route the question outside of the Library of Congress. Every LC Ask A Librarian web form asks patrons: "This Ask A Librarian form uses QuestionPoint, a global, collaborative reference service. May we have your permission to forward your question outside the Library of Congress if necessary and to archive your question and corresponding answer?" Patrons have a yes/no option, with the default being "yes." If a patron opts out, then you cannot send the question to the GRN or add it to the KB. You will find the patron's response in the third field of the full question view: "Forward to CDRS? (Yes/No)."

2.) Librarians are strongly encouraged to respond directly to the patron with information about the GRN and the routing process to indicate what action has been taken on the question. (The reading room may want to establish an institution script for this purpose.) The librarian may also want to include the reason for routing the question in this note to the patron. If the librarian believes there is no answer, the patron may be informed of what resources have been searched. The librarian may send this note to the patron as a clarification, or as an answer.

3.) If the librarian is able to partially answer the question, but does not want to send it to the patron or wants it saved as a part of the question history, the librarian puts this information in the answer text box and clicks on the "Draft" radio button, and then clicks on "Submit." (The librarian may want to establish an institution script if he/she plans to use this method frequently.) Another alternative is to use the "Comments" field on the routing form.

How to route a question
To escalate a question to the GRN, first, click on the question, and then select "Best Match Route" in the drop-down menu, and click on the gray "Refer Question" button. Then complete the routing information form on the next screen. The more metadata that is completed on this form, the better the match the system can make.

NOTE: The information collected on your Ask A Librarian web form does not carry any information over to the global routing form, except the patron name and patron e-mail address.

When deciding which values to select in the routing form, you should keep in mind the algorithm used to determine to which library a question is sent. In particular, the percentages of weight (out of 100%) that specific elements carry are as follows:

- Subject and Geographic Subject Area—40%
- Format—10%
- Location—10%
- Availability—20%
- Load—20%

Fields that require data:
- Subject area
- Subject broad class
- Time deadline
- Education level

    Other required fields with modifiable data:
    - Routing type defaults to automatic
    - Response must be in defaults to any language
    - Send reply to defaults to requestor

- Format defaults to no special format
- Country defaults to USA
- Zip code defaults to 20540 (the zip code for LC).

Optional fields:
- Geographic subject area
- Exclude libraries in my group
- Patron name
- Patron e-mail
- Reason for research
- Keywords
- Resources consulted
- Comments

Routing Type
Under the "Question Classification" toolbar, the first option is "Routing Type." Click on the "Choose a Library" button to choose the responding institution, or click on the "Automatic" button to send the question immediately to another institution (which is the default setting).

Automatic routing will deliver your question instantaneously to the institution that ranks highest in the most of the following criteria: the responding institution's subject holdings, geographic subject holdings, format holdings, geographic location, availability, and global question load. [Details are in the QP FAQ at http://www.questionpoint.org/web/members/usingqp_faq.html#grn_routing].

Should the requesting institution select "Choose a Library," as a "Routing Type," after the rest of the form is completed and submitted, the system will retrieve a list of at least 3 institutions that rank the highest according to the criteria listed in above (provided that there are three matching libraries that have a routing score greater than 0). If there are more than three libraries listed, this means that another library has the same routing score as the one in the third position. To complete the routing of the question, the librarian must then click on one of the library names in the list. Or, the librarian may click on the "Change Routing Parameters" button to return to the previous screen so that they may modify their search for a more appropriate responding institution.

Subject Area
The librarian may use LC Classification Outline to select a Subject Area and a Subject Broad Class, and the GAC to select a Geographic Subject Area in order to route the question to an institution with such subject strengths. The Subject and Geographic Subject fields may be completed in conjunction or separately.

Geographic Subject Area
The Geographic Subject Area should be used to identify to the geographic area that pertains to the content of the question. The librarian may click on "Find," fill in a search term, and then "Find Next" to search for keywords in the Geographic Subject headings.

Language of Response
The "Response must be in:" field refers to the Languages Served portion of each global subscriber's profile. Here, you can designate in the drop down box what language you would like the answer to the query in. As with the "Country" field, the languages listed in this menu are limited to the languages served by those that are active in the Global Network. In parentheses to the right of each language is a count of the number of participating QP members that serve that language.

Send Reply To
Specify whether the question response should return to you, as the requestor, or the patron, or to both in the appropriate check boxes. If you select "Send reply to: Requestor" or both, you are responsible for delivery of the answer to the patron, and for closing the question.

NOTE: If the question was added to the system from a phone, fax or walk-up transaction, the question may not have an e-mail address for the patron. Make sure there is a primary contact e-mail address for the question if you are going to select "Send reply to: Patron."

Time Deadline
Create the deadline that indicates when you or the patron would like to have the answer to the question. You may select from: 8, 12, 24, or 48 hours, or 7, or 30 days. If no indication is given in the inquiry, 7 days is recommended.

Education Level
Indicate the education level of the patron in this field, so that the responding librarian may be able to determine what kind of answer may be appropriate for this patron. Look at the full view of the question to see what education level the patron selected when they completed the Ask A Librarian form (Adult, Master/Ph.D., Primary/Elementary, Secondary, or Undergraduate/VoTech) and match it to the education level field on the best match route form.

Format
If the answer that you require necessitates ownership or access to materials of a specific format (i.e. Art Work, Book, Braille, Computer File, Globe, Large print, Manuscript, Map, Microform, or Motion Picture), you may indicate that in this field. The default value for this field is "No Special Format." NOTE: This field is worth 10% of the total routing value. For this reason, you may match the question to an institution that does not necessarily meet this criterion.

Preferred location of the responding institution
Under the "Preferred Location of Answering Library" toolbar, the country/zip code field will default to that of the requesting institution (LC: USA, 20540); however, you can use the drop-down menu to identify a country, or add the zip code, of a member institution that you would like to direct the question towards. This will affect only one part of the routing algorithm, so your question is not guaranteed to go to that country or zip code. The list of countries in the drop-down menu is limited to those that are active in the Global Network. In parentheses to the right of each country name is a count of the number of participating QP members available in that country. NOTE: This field is worth 10% of the total routing value. For this reason, you may match the question to an institution that does not necessarily meet this criterion.

Prevent the question from going to other reading rooms at LC
Check the check box at the bottom of the routing form that reads, "Exclude libraries in my group" if the routing librarian wants to exclude other LC reading rooms from the pool of eligible responding institutions when routing a question. This forces the question to leave the Library of Congress.

Comments
When routing a question to the GRN, add comments in the optional "Comments" field at the bottom of the form to provide the next responding institution with information about why the question is being routed, and/or what sources have been searched.

On-Call Librarian
If you have any routing problems, you may contact the on-call librarian at qphelp@loc.gov. The on-call librarian helps with questions that have reached their time deadline, questions that were rejected three times, and questions that can find no match. If you have completed the global routing form and the system cannot make a match, you have the option to modify your routing parameters or to send your question directly to the on-call librarian for assistance.

g. After referring or routing your question

A question can only reside in the original and responding institution question lists. The institution that is the original recipient of a question is the institution that "owns" a question. When referring or routing a question the referred institution is granted temporary ownership of the question, with the ability to answer the question, reject the question, or to refer the question to another partner. At any one time there can be only two institutions with rights to access the question. For referred or routed questions, some ownership rights are suspended while the other institution has temporary custody; for example, the original institution cannot delete a question while another institution has that question, but has to recall the question to reestablish delete rights.

NOTE: Remember that when questions are referred or routed, you may be working with institutions that have differing practices.

Where to find your question
After the question has been referred or routed, you can usually find the question in the Referred question list. If you open the question to its full view, you can view its complete question history, where the question has been assigned and even the name of the librarian the question has been assigned to. If would like to inquire about a question that was referred to a local partner, you may contact the LC Consortium Administrator.

After your referred or routed question has been answered, you will find it in your Referred question list with an answered icon in the status column, unless the responding institution has closed it (then it will be in your Closed question list).

If the question was routed to the GRN, you may view the question and its status in your Referred question list until 24 hours after the question turnaround deadline has elapsed. At that time, the question will be moved to your Closed question list. If you do not get an answer to a globally routed question, you can send an inquiry with your question ID number to the on-call librarian, who can look at your question and contact the responding library or re-route it. Should you want to contact the institution that has received your question, you may contact the responding library on your own or ask the on-call librarian for assistance. By clicking on "Routing View," you can see where your question was routed.

Recall/Update Routing Information
Do NOT Answer, Close, or refer a question after you have already referred or routed it, as the action may reassign the question to you or confuse your partner or patron. If you have referred a question to a partner and would like to perform an action on it (e.g. delete it), you must first recall it. You cannot recall a question from the GRN, but you may choose to "Update Routing Information."

If you want to recall a question, go to the drop-down menu for "Refer Question" and you will see "Recall from e-mail" for questions that have been e-mailed out of the system to a partner/expert. You will see "Recall from partner" for questions that have been sent to another reading room or cooperative partner. Once you choose "Recall from e-mail" or "Recall from partner", you will be given the option to state your reasons. The question will then move from your Referred question list back to the Active and New question lists. A notice will be sent to your partner telling them of the question recall and to disregard the question. The recall will be noted in the question history. Your partners will no longer be able to access that question in the system.

If you want to "Update Routing Information," go to the drop-down menu for "Refer Question" and you will see "Update Routing Information" as an option for questions that have been routed to the GRN. On the global question routing information form, you may modify any of the information previously entered, however the question will not be re-routed. There will be no note in the question history of the changes. The previously assigned responding institution will receive an

alert e-mail ("Routing information update") with the new routing parameters. If necessary, this is one way to indicate a modified turnaround time. Or, the new parameters will redirect the question should the current responding institution reject it.

When to close your question
The library to take the last action on the question should close the question. If the responding library answers the patron, then they close the question; or if the referring library has asked for the answer to send back to the patron, they should close the question instead.

In the local system, when a question is yours, or has been referred to a local partner or cooperative group, the responding/answering institution is responsible for closing the question after it has been completed.

For questions that have been routed through the global network, the responding/answering institution is responsible for closing the question after it has been completed, UNLESS the requesting institution has asked that the answer be returned to them (and them alone) for delivery to the patron or there is no e-mail address for the patron. When the requesting institution has selected delivery to both the patron and themselves, the answering institution is to close the question as they still retain the final action on the item. Click on "Routing View" and look at the "Send answer to:" field to see if the question is going directly to the patron, the requestor, or both. The default in the system is "Send answer to: Requestor."

Do not close a question after referring/routing it to a partner or to the global network. Closing a question is a system-wide action. After you route or refer a question, the assigned library receives an e-mail message about the routing or referral. But if you close the question after making the routing or referral, the assigned library won't find it in their New and Active questions lists; it appears in their Closed list instead. The same is true for the patron's QP account.

h. Delete
(For QP Institution Administrators)

Only QP Institution Administrators may delete questions that originate at their institution. Questions routed or referred from other institutions cannot be deleted. QP Institution Administrators may delete questions that have come into the QP system with little content, an invalid patron e-mail address, as a test, duplicate questions, or Q&A sets that would not add value to the Knowledge Base nor be useful in the Service History.

There is only one question in the system, no copies. When a question is deleted from your account, the question is deleted in the entire system, including any referring or routed libraries, the patron accounts, and the service history. Once deleted, the question is no longer viewable or retrievable by anyone.

NOTE 1: If a question has been referred or routed, it must be recalled before it can be deleted.

NOTE 2: Questions that are deleted will not be deleted from QP system reports. All questions that come into the system are counted as one. The system will add, not subtract transactions. If the deleted questions do not have an answer, they will be tracked in your reports as "Unanswered."

NOTE 3: Based on US Government regulations, LC questions are required to be maintained live in the system for 90 days. Questions may be referred, closed or added to the KB, but generally should not be deleted except in instances of duplicate questions, test questions or by the discretion of the Supervisor.

i. Add a script

The purpose of scripts is to minimize the length of time spent on responding to each question.
All scripts should be:
- clear
- concise
- accurate
- reviewed on a regular basis
- properly formatted for use in the QP system (e.g. URLs)
- verified for correct spelling and grammar

Institution scripts
Scripts help librarians to provide consistent service within the institution. Institution scripts should be developed and/or approved by the QP Institution Administrator, while adhering to any other necessary channels of approval. A sampling of some scripts currently used at LC is on the LC staff Web site at http://www.loc.gov/staff/rr/refresources/scripts-main.html.

Individual scripts (My scripts)
Individual librarians should develop personalized scripts (My Scripts) if he/she:
- receives similar types of questions that merit similar responses
- has a subject specialty that merits a personalized script
- often makes the same reference to another institution, association, resource or Web site
- wants to establish a greeting or closure for each response

j. Assign a question
(For Ask Administrators)

Only Ask Administrators have the QP system account privileges to assign questions to other librarians in their reading room. They may use the "Assigned to:" function to search for all questions in the Active question list that are currently Unassigned. Ask Administrators will also want to sort the Active question list by status to catch all New questions. When you click on the "Status" link at the top of your question list, the system will bring all of the questions with a "New" status to the top of the list. New questions may also be questions that have been reopened by the patron or referred from a partner, so they may not enter at the top of the chronological Active question list unless you sort by status.

Using the drop-down menu next to the "Assign Question" button, you may select the appropriate reference librarian from your reading room to answer the question. Some reading rooms may choose to self-select questions from the question list instead. In this case, a librarian may open an unassigned question, and then click on "Claim" to assign it to him/her. When a question is assigned, the librarian will receive an alert e-mail regarding this new assignment.

Comments, complaints, and suggestions about library services, staff, or facilities should be assigned to your management. The librarian may respond to the patron to explain the action being taken.

Administrators can add a note for a librarian when they are assigning questions to staff by assigning the question and then typing their message into the answer text box. Then click on "Draft" and then "Submit." This will assign the question to the librarian and leave a note in the answer box for them. When the question is opened, the librarian will see the note. The note can be deleted from the text box before the response is sent. The note will not be saved in the question history. If you want the note to be saved in the question history without the patron seeing it, make a librarian note.

k. Make a librarian note

Select "Librarian Note" as your message type, and then click on "Submit," when you want to enter a note that you and other librarians can refer to later. A Librarian Note is not sent to the patron, but is saved and appears viewable by librarians only in the Question History.

NOTE 1: Composing and submitting a librarian note does not perform any referral or routing action on the question. If you would like to assign, refer or route the question, you will have to perform a second action.

l. Save draft

When composing an answer within the QP system, remember to click on "Draft" and then "Submit" at least every 10 minutes to prevent losing your work. Your entry will not be sent to the patron, but will be saved in both the Message box and in Question History. You may return to the QP system to complete your answer and respond to the patron at a later time if you click on "Draft" and "Submit" before logging off.

NOTE: If you save your draft and exit the question screen, any attachments added will not be saved.

m. Close question

When you select "Close" in the File Question or Update List menu, the status of the question is changed to "Closed" and the question is moved to the Closed question list. The 'closed' status for QP questions is system-wide. For this reason, DO NOT close a question after referring/routing it to a partner or to the global network. For more information, see "*When to close your question*" on p.29.

Manual close of the question
The library performing the last action on the question should close the question. In most cases, the responding librarian closes questions upon submission of the response to the patron. When routing or referring a question, do not close the question. As the requestor, you may only close the question if you have received an answer to a globally routed question and you have requested the answer be sent only to you on the global routing form.

Automatic close of the question
Global questions that have gone 24 hours beyond their turnaround deadline will be closed by the system and moved to the Closed question list, even if they are unanswered. If a question has been closed automatically, it can still be answered. Look for it in your Closed question list or do a search for the question number to retrieve it.

How a closed question becomes active again
Actions such as answer, request for clarification, or referral will reopen and move the question back to the Active question list. In addition, if a question has been closed and the patron replies to the QP e-mail, or responds through their QP patron account, their inquiry will return to 'active' status, and an alert message will be sent directly to the librarian to whom the question was assigned.

n. Add to the Knowledge Base (KB)

When to add a question to the Knowledge Base
First, verify that the patron has given permission to retain their question in the Knowledge Base (for questions that have come into the QP system via the LC Ask A Librarian form). Every LC Ask A Librarian web form asks patrons: "This Ask A Librarian form uses QuestionPoint, a global, collaborative reference service. May we have your permission to forward your question outside

the Library of Congress if necessary and to archive your question and corresponding answer?" Patrons have a yes/no option, with the default being "yes." If a patron opts out, then you cannot send the question to the GRN or add it to the KB. You will find the patron's response in the third field of the full question view: "Forward to CDRS? (Yes/No)."

Permissions for adding to the Knowledge Base
(For QP Institution Administrators and All QP Users)
Secondly, your QP Institution Administrator must set the appropriate permissions for you to have the ability to add a Q&A set to the local or global KB (under Administration/Accounts/View & Update Accounts). It is recommended that your QP Institution Administrator set all librarian account permissions for the global KB to "Add/Submit." Privileges for the local KB will depend upon whether your reading room has a designated KB editor (see "Designating a Knowledge Base editor" below). If you do not have a KB editor for your reading room, your QP Institution Administrator should set all librarian account permissions for the global KB to "Edit/Delete KB." If there is a KB editor for your reading room, the QP Institution Administrator should give "Edit/Delete KB" privileges to the Editor, and "Edit KB" privileges to all other librarians. You may only delete KB records if you have "Edit/Delete KB" privileges.

To view your personal account privileges, go to Home/Settings and look under the red tool bar labeled "Account Privileges."

Designating a Knowledge Base editor
Each reading room can allow individual librarians to submit their Q&A sets to the local KB upon completion of the answer, or to have a week end review responsibility assigned to an individual who will review the questions processed each week (or more or less frequently, as needed). This individual must have "Edit/Delete KB" privileges. Local KB editors are expected to add, edit, activate, and possibly delete Q&A sets in the local KB. For step-by-step procedures for these activities, editors should access the Help feature while in the Knowledge Base module. Records that are ready for review in the KB are marked as 'inactive'. Editors retrieve records for editing and activation by browsing for all 'inactive' records in the local KB answered by their reading room.

Criteria for the manual submission of Q&A sets to the Knowledge Base
If the patron has given permission to add the question to the KB, and you have at least "Add/Submit" privileges, your Q&A set may be added to the local or global KB upon completion of the answer. Questions that have been routed through the Global Reference Network are automatically put in the 'inactive' queue to be added to the global KB by an editor when the question is "closed."

A Q&A set should be submitted to the local KB when the content of an answer:
> a) contains LC-specific information, such as information about the Library's history, collections, programs or services
> b) may be effectively reused by LC librarians as a full or partial response to patron queries

A Q&A set should be submitted to both the local and global KB when the content of an answer:
> a) may be useful to a global community of reference librarians and patrons
> b) is authoritative (appropriately referenced or cited)

Your reading room administrators may indicate additional conditions for KB submission, if it is appropriate for your reading room.

Choosing between the global and local Knowledge Base
There are two types of Knowledge Bases: the global Knowledge Base and the local Knowledge Base. The global KB is a single repository, available to all QP members, that archives the Q&A sets of all questions that have passed through the GRN by all QP participating institutions. A

local KB, on the other hand, is created and maintained by an individual library or consortium as a repository for questions that have been answered only by that specific institution(s). The Library of Congress functions as a consortium; all of its reading rooms/divisions are treated as individual institutions that together form a group, and they share a single local KB.

Use the local Knowledge Base to:
- Create an archive of your reading room's answered questions. Questions in the KB can be browsed by reading room, and thus all questions added by a reading room to the KB can be retrieved as a single set.
- Search some of the Library of Congress's Q&A sets.
- Share your KB with a cooperative group when you are the creator of the cooperative group.
- Track statistics. If a reading room adds all its questions to the KB, it will be able to track how many questions it's answered, over what time periods they've been answered, the subjects with which they've dealt, etc.

Use both the local and global Knowledge Base to:
- Reduce question duplication and response time. Librarians can identify and use answers from the KB to answer new questions on the same or a similar topic.
- Share expertise. Librarians can learn about specific subjects, reference sources, and digital reference response techniques by browsing the KB.

How to add questions to the Knowledge Base
You may submit a question and answer set to a KB using any of the following methods: (For more details, see "Submitting Question-and-Answer Sets to the Local Knowledge Base" at http://www.loc.gov/staff/rr/refresources/Peter%27sKBGuide_Final.doc and see http://www.questionpoint.org/web/members/documentation/gs/gs_kbview.html.)

I.   From a Full Question record in the Ask module. You must be an active member in your consortium to add records to the database. When you use this method, you can modify and enhance the Q&A set before it is added to the KB. To begin to add a Q&A to a KB from a Full Question record, select Add to KB in the drop-down list for the File Question. On the Add New Question and Answer screen, prepare the Q&A for adding to the KB:
   a.   Verify and correct the information in the required fields marked by an asterisk (*).
   b.   Select the KB to which they should be added (local or global).
   c.   Edit the Q&A as needed to make them more suitable for viewing in a KB.
   d.   Complete as many of the other fields as you can, providing data needed to retrieve, use and manage the Q&A set effectively. Click on "print view" in the original question to open a separate window, which will aid the viewing and transferring of patron metadata or routing information.
   e.   When you are finished, click the Save button located at the top and bottom of the screen. The Q&A set has been added to the KB that you selected.

II. From a question list in the Ask module. In the question list, check the box in the Question column for each question that you want to add, select one of the options in the drop-down list next to the Update List button (either "Submit to Local KB (The LIBRARY OF CONGRESS), Submit to Global KB, Close & submit to local KB (The LIBRARY OF CONGRESS), or Close & submit to Global KB), and then click the button. Note that you cannot modify the Q&A sets before they are added to the KB when you use this method. Records are entered into the KB with an 'inactive' status, and must be reviewed and activated by a KB editor. All extra demographic information such as education level and reason for research will not map to the KB record using this method. These values for some demographic information will default unless you add a question using method #1.

III. From inside the Knowledge Base module. Click the Add tab in the Knowledge Base module menu. No data is automatically supplied in the Question and Answer fields.

Select either the local or global KB, provide the data for the Q&A set and click the Save button located at the top and bottom of the screen.

IV. By closing an answered question that has been routed through the Global Reference Network.

KB submission method #1 (above) is recommended if you do not have a reading room KB editor and each librarian is going to be responsible for editing and activating his/her own Q&A sets. This method retains the most metadata, and the process by which a record must be activated in the local KB will require the same steps. If you do have a reading room KB editor, it will be quicker to use method #2 (above).

If you would like to add questions to both the local and the global KBs, you must do so with two separate actions. **Records cannot be submitted to both the local and the global KB simultaneously.** If you are going to submit a Q&A set to both KBs, it is recommended that you first submit it to the local KB because you can submit an existing local KB record to the global KB from inside the KB record.

NOTE: All records saved to the KB must enter with an 'inactive' status unless subsequently activated by a KB editor. 'Inactive' questions can only be retrieved from the KB using the Browse search function; they cannot be found using Basic or Advanced searches.

Patron information in the Knowledge Base
Once a record is entered into the KB, the patron name and e-mail metadata are stripped from the record. However, if the question is retained in the active QP system (e.g. the Closed question list), the patron information will remain intact for 90 days after the last action on the question. At that point, the question will be added to the Service History without personal patron information.

NOTE: In order to retain some patron demographic information, the question must be added to the KB (via full question view, method #1 above) before the 90-day expiry to the Service History.

Searching the Knowledge Base
The KB help documentation on searching the KB provides instructions on how to find KB records by keyword, by ID, and by browsing 'inactive' records.

NOTE: The KB ID is not the same as an Ask A Librarian question ID in the Ask module. The KB identification number is a unique identifying number only in the KB, but you may search active KB records by either number.

o. Attachments

You can attach up to 2 files, each 2 MB in size, to send to the patron (e.g. an image, a text file, or a spreadsheet). Identify the attached materials, content, purpose, and means of access for each resource in the answer text. For example, "I've attached a Microsoft Word document and an image (viewable with an image-viewing application, including your web browser) as examples.
File attachments:
1.) attachments.doc. Word file 51 KB copied from Administrative folder, 7/22/02.
2.) moreinformation.jpg. JPG file 14 KB copied from Group Staff folder, 7/22/02."

Consider that some Internet services may bounce e-mails that are too large for the patron's personal e-mail account (i.e. the LC file limit is 3 mg). Bounced e-mails will be sent to your alert e-mail notification address. You may ask the patron about the document size limit before sending the attachment.

NOTE: If you need to send attachments larger than 2 MB, you must send them via GroupWise or print and send them by postal mail.

Attachments are not retained in the QP system due to server space, so if you have attached your bibliographic citations or other pertinent information the Q&A set may not be KB material. The attachment goes out from the librarian's personal computer directly to the requestor and/or patron, attached to the QP system alert e-mail that contains the answer. The question history will note that there was an attachment sent out with the answer, but the content of the attachment will not be accessible.

NOTE: Patrons cannot send attachments into the QP system.

2. Global Reference Network Questions (via Global Routing)

Globally routed questions have been sent to your reading room from another participating QuestionPoint institution in the Global Reference Network. Using the global routing web form to collect question metadata, questions are matched to an institution based on the information in the institution's profile. When a question has been routed to your reading room, you will receive an alert e-mail from the QP system containing your institution's routing values, and the total score your institution received based on the current algorithm. You may have received the question via Automatic routing as the institution with the highest score, or you may have been selected from a list of the best matching libraries retrieved via Choose A Library routing. You will be notified of any new globally-routed questions via e-mail at the alert e-mail address designated by your QP Institution Administrator in your institution profile contact information.

The primary options for handling a question that has been routed from the Global Reference Network (GRN) include: answer, request clarification, refer by e-mail, refer to partner (my subscription group), refer to partner (all cooperative groups), or reject. Other standard QP functions include: add script, assign question, make librarian note, save draft, close question, add to the Knowledge Base, and add an attachment.

These are many of the same options as you have when handling a question that has come from the LC Ask A Librarian form. Refer by e-mail, Refer to Partner (My Subscription Group), Refer to Partner (All Cooperative Groups), add script, assign question, make librarian note, save draft, and attachments all work in the same way as described on pps.21-35. The function exclusive to handling global questions is Reject.

a. Answer

As a courtesy to the patron, indicate in your answer that this question was routed to you via the QuestionPoint Global Reference Network. On the global routing form, the referring institution specifies whether the response will go back to them, directly to the patron, or both. You can see where the response will go when you click on "Routing View" and look at the question's global network routing information.

When answering questions that have been routed to you from the Global Reference Network, be sensitive to international issues such as: dissimilar cultural environments, language differences, differing resources, and other differences (e.g. the metric system).

Remember that these questions have varying time deadlines. QuestionPoint participants are expected to meet or beat the turnaround time deadline for all globally routed questions. Always click on "Routing View" to verify the time and date that the answer to the question is due. If you cannot meet that deadline, reject the question to route it to a new institution. It is acknowledged that the expected turnaround time in the Global Reference Network may be shorter than our established policy. Answer questions as quickly as you can, and reject them if you know that you cannot answer it within the stated turnaround time. The available times that you have set in your

profile have nothing to do with the turnaround time of the questions you will receive. You cannot set your profile to receive questions with a longer turnaround time.

If you cannot answer within the requested turnaround time, the QP system will automatically close a question 24 hours after it was due. You, as the responding institution will receive three e-mail alerts related to the question due date/time: 1.) 75% of the time for the life of the question has lapsed (a warning); 2.) 100% of the time for the life of the question has lapsed (the answer is now overdue); 3.) The question has been automatically closed by the QP system, as the answer to the question is now 24 hours overdue, and the question moves into your Closed question list. (Alerts #2 and #3 are copied to the on-call librarian, so you may receive an additional reminder from the on-call librarian.)

To prevent the question from being automatically closed 24 hours after the turnaround time has passed, respond to the question, even if it is just to say that you are still working on the question. (NOTE: This action will not change the question deadline.) Questions that have gone 24 hours beyond their turnaround time will be closed by the system and then they are located in the Closed question list, even if they have been left unanswered. If a question has been closed automatically, it can still be answered. Look for it in the Closed question list or do a search for the question number to retrieve it.

NOTE 1: You may also provide a partial answer and then reject it. The patron will get a little information, and then the question will be automatically routed to another institution. Let the patron know what you have done and that you will be passing the question to another library for additional information. Then the next responding institution can review your answer and concur or complete it.

NOTE 2: If you cannot answer a question, you must choose an option under "Refer Question" to move the question forward. You cannot route a question back to the last librarian or library in the QP system.

b. Request Clarification

If the answer has been marked to return to the requestor and not the patron, your request for clarification will go to the alert e-mail of the requesting institution, not the patron. Click on "Routing View" and look at the "Send answer to:" field to see if the question is going directly to the patron, the requestor, or both. When the requesting institution has selected delivery of the answer to both the patron and themselves, your request for clarification will go to both the requesting institution and the patron.

c. Reject (Best Match Route)

Select Reject in the Refer Question drop-down menu to automatically route a global question to another institution in the GRN. A rejection will reroute the question to another library; it does not go back to the library that sent it, or any other institution previously working on the question. If the question must be rejected, do so in a timely manner in order to allow for the maximum turnaround time after reassignment.

When to reject a question
A question may be rejected if:
- The workload of the reading room or librarian is such that the question cannot be answered within the designated turnaround time. (The time deadline can be found by clicking on "Routing View".)
- The question seeks an answer outside the scope of the resources and services of the Library of Congress
- The information need can be met more effectively and efficiently outside the Library of Congress

- The appropriate staff member who could answer the question is on leave
- The librarian finds conflicting answers and would like input from another library
- The librarian believes there is no answer or cannot find an answer, and another library may be able to verify the belief that there is no answer or can provide an answer

If the librarian would like to provide the next responding institution with information about resources that have been searched, and/or why the question is being rejected, they may make a draft or a librarian note before rejecting the question. Or, the recommended method is to add comments in the text box labeled: "Reply: Reason for rejection" on the following page after selecting "Reject" and clicking on "Refer Question." (The reading room may want to establish an institution script for this purpose.)

Once you have rejected a question, you will not be able to find it in any question list. Questions are only viewable to the originating institution and the institution that the question is currently assigned to; if you reject it, it is no longer yours to answer.

d. Delete

The QP Institution Administrator may delete global questions from the update question list only if the question has originated from his/her institution. Questions routed from other institutions cannot be deleted.

e. Close a global question

For questions that have been routed through the global network, the responding/answering institution is responsible for closing the question after it has been completed, UNLESS the requesting institution has asked that the answer be returned to them (and them alone) for delivery to the patron or if there is no e-mail address for the patron. When the requesting institution has selected delivery to both the patron and themselves, the answering institution is to close the question as they still retain the final action on the item. Click on "Routing View" and look at the "Send answer to:" field to see if the question is going directly to the patron, the requestor, or both.

NOTE 1: NEVER close a question after globally routing it. Closing a question is a system-wide action, which will place the routed question in the responding institution's and the patron's Closed question list.

NOTE 2: The default on the Global Routing form is "Send answer to: Requestor", so be sure to change the default to the other checkbox: "Send answer to: Patron" if you do not wish to see the answer and do not want to close the question later.

f. Add to the global Knowledge Base

All globally routed questions are automatically submitted to the global KB when they are closed, unless a question went overdue and was automatically closed by the system without an answer. A question without an answer cannot be submitted into the KB. The question must first be answered and then it must be closed again for automatic submission, or manually added to the global KB. If you have answered a question after its turnaround time and after the question has been closed by the system, you will have to manually add this Q&A set to the global KB. All global questions enter the global KB with 'inactive' status and must be edited and activated by a KB editor.

3. Standard Chat Questions

a. General guidelines

Every QP institution profile comes with the standard chat tools, however a patron-accessible chat form must be set up on your Web site in order for patrons to be engaged. All reading rooms may provide chat services and may select their own hours of availability, provided that these hours are indicated on their web forms. Click on the tab in your Ask module labeled "Chat" to open your chat monitor and accept patron calls.

QuestionPoint also offers an Enhanced Communications Package (QPE) with a more sophisticated chat tool made by Convey. Some reading rooms may use QPE instead of standard chat, which will enable them to co-browse, share applications and use video or voice technologies. This chat tool requires a patron download.

NOTE: The rest of these chat guidelines primarily refer to Standard Chat tools and practices.

b. Technical advisories

All QP chat users are responsible for being aware of the following advisories and making the necessary adjustments in their browser settings.
1. Chat sessions do not pass over a secured server.
2. Chat windows refresh every 5 seconds, but this may be slower if you or your patron is using a dial-up modem.
3. When you are logged into your chat monitor, your QP session timeout is turned off, which will keep your authorization live in the system until you Logoff Chat. Keep the main interface window open when the chat monitor window is open. Minimizing the window is OK, but closing down the browser or logging out of QP ends the entire QuestionPoint session.
4. Always be sure to end all chat sessions, close all chat windows and click on "Logoff Chat" in the chat monitor window before logging out of the QP system. If you don't formally end your session, the system (and the patron) thinks it is still live. This is the case even if you can no longer see the session listed in the chat queue. If you close down the chat session browser window but do not log off of the monitor, the chat monitor window remains open for thirty minutes and can continue with a chat session or even take a new one. However, the window will be shut down soon after, and it will appear as if the session was dropped. After you logoff chat, you will not be logged out of your QP account. NOTE: Either the patron or the librarian can end the chat session.
5. For system efficiency, clean out your browser cache regularly. (See p. 12.)
6. Enable JavaScript in your browser preferences. You don't have to download anything to use JavaScript, but you need to ensure that your browser is configured to use it. Because the procedure for enabling JavaScript varies by browser type and version, check your browser's online help for the procedure that applies to you. However, most browsers enable JavaScript by default.
7. Enable pop-up messages in your browser preferences, and turn off pop-up blockers. Modifying your preferences will vary by browser type and version.

c. Troubleshooting problems

If your browser appears to have frozen, watch the date/time stamp in your chat monitor window to see if it changes every 15 seconds. If not, try clicking on the Refresh link in your chat monitor window or on your browser.

If you appear to have been logged out of the system, you can try clicking on your browser's back button to put you back on the chat monitor window where you can continue with whatever you are currently working on in the system, including continuing in-progress chat sessions. Your current session has not actually been logged out, despite the logout window that pops up for you. This may happen when you have improperly closed a chat session.

If chat is not working for other some reason, yet you are able to get a brief connection with a patron, it is good to prepare an institution script that will direct the patron to your Ask A Librarian web form to submit a question asynchronously. There are known problems with AOL and WebTV users. If your patron has an e-mail address with an AOL or WebTV domain name, you can expect complications and you should try to send them this script.

Pop-up blockers may interfere with the session or cause data to be lost when the patron pushes a URL to the librarian. It is also possible that pop-up blockers could cause the monitoring librarian to be unable to accept chat sessions.

If you do not receive a chat transcript from a chat session with a patron, you may have left some chat windows open or logged off the chat monitor. To retrieve the chat session, log back into your chat monitor and end any incomplete chat sessions.

If you try to test your chat service by chatting with yourself, use two different browsers if working on same workstation each for the "patron" and librarian. It's also best to use different browsers if you're testing question referral from one library to another or if you're simulating multiple users, librarians, or libraries.

d. Chatiquette

Conduct a reference interview
When possible, chat with a patron should be initiated as soon as the patron enters the chat queue. Chat queries should be served in the order that they are received. Librarians serving chat patrons should identify themselves immediately upon initiation of conversation. This introduction should be scripted in the librarian's scripts. Allow the patron to state fully his/her information need in his/her own words before responding. Conduct a reference interview to determine whether the user needs an immediate answer or would like to learn how to find the information. Rephrase your perception of the patron's question or request and ask for confirmation to ensure that it is understood.

Use open-ended questioning techniques to encourage the patron to expand on the request when necessary. For example, "Please tell me more about your topic." or "What additional information can you give me?" or "How much information do you need?" Use closed and/or clarifying questions to refine the search query. E.g. "What have you already found?" or "What type of information do you need (books, articles, etc.)?" or "Do you need current or historical information?" You may want to establish these as institution scripts.

NOTE: There is no context to determine the age, location or educational level of the patron in each chat session.

Keep the conversation moving
Avoid excessive chat because it takes time to type and to read in a chat window. Break up long responses into a few blocks (e.g. 30 words per block) to avoid long pauses and so that the patron can begin reading your response while you are completing it. When you have to add a lot of text, maybe with a cut and paste, notify the patron beforehand and let them know that they can read and refer to it in the transcript that will be e-mailed to them. You may want to establish this as an institution script.

45 seconds or less between responses is suggested, so as to confirm to the user that he or she has not been disconnected. Type like you talk, in a conversational manner. Avoid yes/no responses when reasonable. These can be interpreted as cold and unfriendly, just as in face-to-face reference interviews. Explain your search process to the patron and describe what you are finding whenever possible. Remember that the patron cannot see you. Let the patron know what you are looking for and where you are looking. If you are going to be checking printed sources or taking a bit of time with the question, it may be advisable to give the client something to do in the meantime, with a script, such as reading about your library. Bookmark the URLs that you frequently use so that you can easily recall and push them to the patron.

Currently, there is no time limit for chat sessions. Research from other chat projects has indicated an average session may be expected to be about 15 minutes long. Librarians may use their own judgment in this area, and reading room managers may establish their own policy. Always be aware of other patrons waiting.

Communicate clearly
Communicate in a receptive, cordial, and encouraging manner. Use the client's name and ask questions when appropriate. Reply to the specific question and make sure that you use scripts in a way that does not make the process feel mechanical. Clarify confusing terminology and avoid excessive jargon that may be not be understandable to the patron.

Use spelling, grammar and capitalization appropriately. Resources should be fully cited. Quality web sources may be used as resources when appropriate. When you type and send a URL, beginning with http:// the QP system will automatically pop-up a new window of that Web site in the patron's browser. This is called page-pushing. Remote patrons are not authenticated, so pages from a proprietary database will not display in the patron browser. You will be unable to push pages with this kind of information.

e. Use scripted messages
- To introduce the librarian. The librarian should use his/her name, title or initials. E.g. "Hi, I am Janet from the Science, Business & Technology Division of the Library of Congress. How may I help you?"; "Hello. You are chatting with a reference librarian in the Recorded Sound Division"; "Hello! I am the librarian here to assist you"; "Good afternoon, my name is John. How can I help?"
- To ask things that you frequently ask patrons. E.g. "So I may better assist you, can you tell me the city and state you are located in?"
- To help expedite the chat session. However, be aware that using scripted responses too frequently can alienate clients and make the service appear automated.
- To warn patrons of pop-ups for pushed links. When you type a URL into the chat session, the QP system automatically pops up the Web site in a separate window in the patron's browser.
- To push Web sites that you refer to often. When using URLs in your scripts, you must enclose these in angle brackets with spaces, like in the Ask module.
- To keep the conversation moving. Let the client know what you are about to do, e.g., "I'm going to send you a URL for a Web site. I'm looking for the exact page."
- To deal with long chat sessions or initiate follow-up with the patron via e-mail or phone. If the session cannot be closed in a reasonable amount of time and/or there is another patron in the queue, offer to e-mail a response, providing a time estimate. E.g. "I will continue to search for an answer and I will send you an e-mail within X hours or minutes"; "Is this enough to get you started?"; "May I send you an answer via e-mail?" If the question needs substantial work, you may want to refer them to your Ask A Librarian web form.
- To deal with more than one patron at a time. If you feel comfortable, you may also pick up the second patron (it is recommended that you use a separate browser). E.g. "I am currently working with another patron. I will return to this chat session as soon as I can." "Will you please hold for five minutes?"

- To respond to inappropriate behavior. When patron behavior is inappropriate, send a scripted warning message or terminate the call. Repeat offenders should be reported to your QP Institution Administrator and your area supervisor.

f. Handling chat transcripts
At the end of each chat session, the QP system will automatically e-mail the patron a transcript. Anonymous patrons may request an e-mail transcript after the session has ended. Upon completion of each session, all chat transcripts will be found interspersed in your Active question list with an 'answered' status, and with the question title: "Chat Session Transcript with [Patron Name]." Once integrated into your Active question list, chat session transcripts may be handled like any other question; they may be referred or routed. Chat questions must be closed in order to move them from your Active question list to your Closed question list. They may also be submitted to the KB if the session provides information content appropriate for the KB. See p.31-32 for criteria for the manual submission of Q&A sets to the Knowledge Base.

If you cannot complete the query and answer process for some reason, you may choose to follow up with the patron via e-mail, and if necessary, they may be referred to more resources. This is called "sliding" the patron to e-mail. You may want to let your supervisor know when follow-up chat questions affect your question load.

g. Chat Coverage
Your reading room may also participate in cooperative groups that share chat coverage during certain hours. If you have agreed to be a part of a chat coverage group, you must switch your Group Chat Coverage to "On" when you are logged into your chat monitor. Chat patrons that come in via another institution will have a 'forwarded' status icon.

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